



Performance Measures Performance Prep Guide

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System Overview

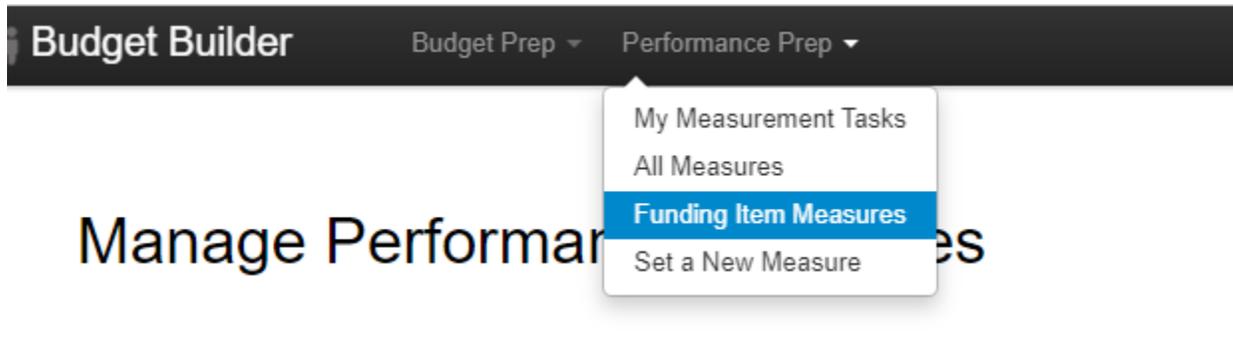
The Governor's Office of Planning and Budget (GOPB) maintains Performance Prep—a statutorily-required system to track agency performance measures. This system is part of [Budget Builder](#) (an application including Budget Prep and Comp Prep) which GOPB utilizes to gather information necessary to prepare the governor's budget recommendations. In Performance Prep, agencies can propose performance measures and report on performance measures and funding items. GOPB and the Office of the Legislative Fiscal Analyst (LFA) also use the system to review proposed performance measures and view reported data for performance measures and funding items. Statutory requirements related to these activities are outlined in [Utah Code 63J-1-903](#), and additional context is included in the [State of Utah Performance Measurement Playbook](#).

Purpose of this Guide

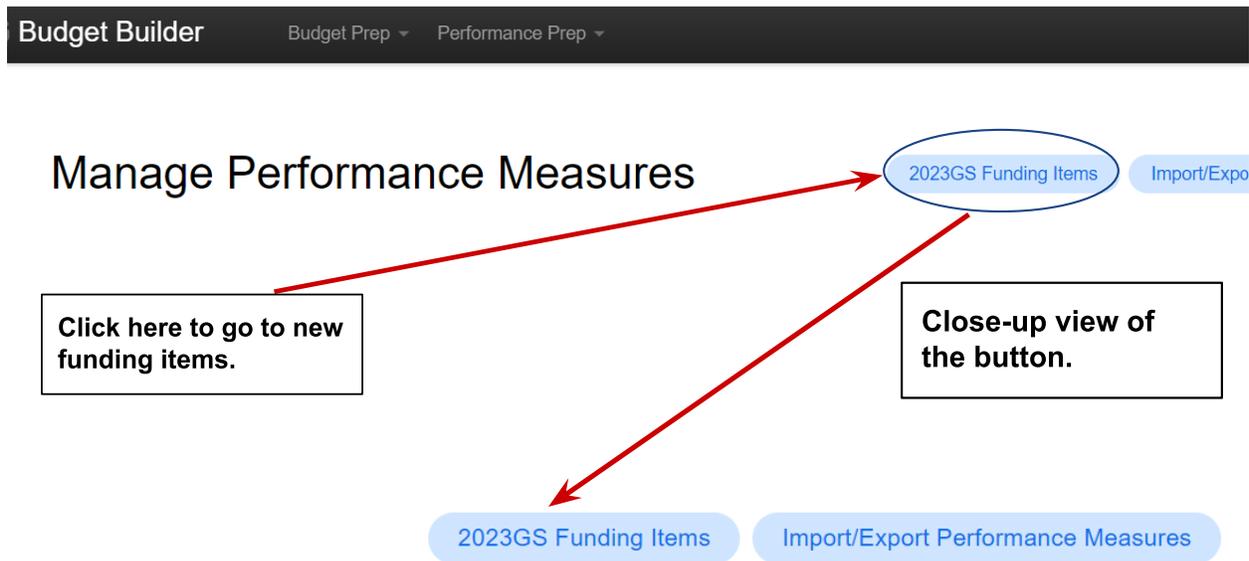
The purpose of this document is to help agencies manage legislatively-required funding items, funding item performance measures, and line item performance measures in the Performance Prep system. This guide shows how to navigate the system, view agency funding items including funding items that require the agency to set a performance measure and target, how to set a performance measure for the applicable funding item, and how to report on funding items and funding item and line item performance measures. This guide also includes instructions for GOPB and LFA analysts to review measures and targets proposed by agencies and for LFA analysts to add comments and recommendations as needed.

Locate Funding Items

The easiest way to navigate to funding items is with the dropdown navigation:
Performance Prep → **Funding Item Measures**



Alternatively, navigate to funding items in Budget Builder from the Manage Performance Measures page. On the page, select the **2023GS Funding Items** button to go to the Funding Item Performance page.



Funding Items and Funding Item Performance Measures Reporting

Reporting Requirements

Agencies are required to report on funding items and funding item performance measures **on or before August 15. Hitting this statutory deadline is crucial because this information will be reported to EAC by agency of who fully submitted the required funding item reporting on or before August 15.** There are three components agencies are required to report:

- Month and year of implementation (or the month and year in which the agency anticipates fully implementing the program or project)
- Actual amount spent on the funding item
- Outcome data for FY 23 for the performance measure

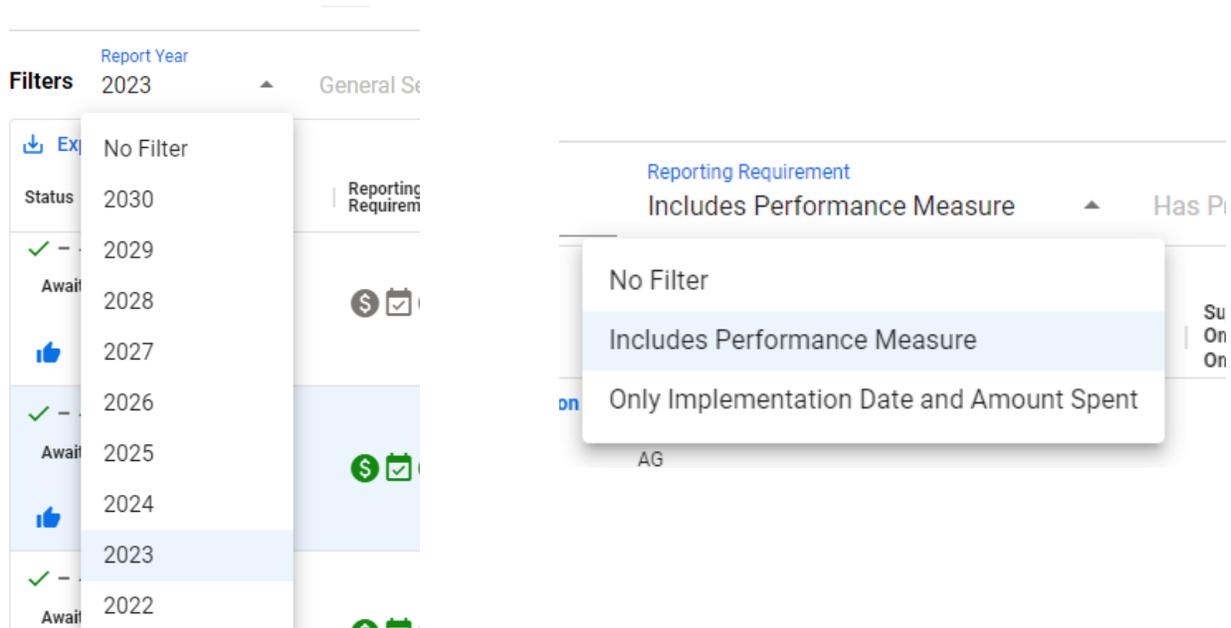
Funding Items on Which You Will Need to Report

Agencies need to report on the following funding items. A comprehensive list of funding items and funding item performance measures on which you need to report is in [this Google sheet](#).

- Funding items where the performance measure has a target for FY 23 (includes funding items from the 2021, 2022, and 2023 general sessions).
- 2022 General Session funding items where the performance measure has no fiscal year identified for the target
- 2023 General Session funding items under \$500,000 that received supplemental (FY 23) funding
- Prior-year funding items identified for an additional year of reporting (in the 'Repeat Reporting' tab of the [Google sheet](#)). **These prior-year funding items will NOT be reported in Performance Prep. The required information should be recorded in a Google sheet or Excel file and emailed to Jill Curry , Brenda Hernandez , and Kimberly Madsen** (you can make a copy of the 'Repeat Reporting' tab and use columns P-R) .

Performance measures with an FY 23 target

You should be able to filter for funding items where the performance measure has a target for FY 23 by filtering Report Year to '2023' and the Reporting Requirement to 'Includes Performance Measure.'



2022 General Session funding items where the performance measure has no fiscal year identified for the target

The easiest way to identify 2022 General Session funding items on which you need to report where the performance measure has no fiscal year identified for the target is to filter the [Google sheet](#) for 'No Target' for Target Fiscal Year (Column O).

2023 General Session funding items that received supplemental (FY 23) funding

You are required to report on the 2023 General Session funding items that received supplemental (FY 23) funding. The easiest way to identify these items is to filter [the Google sheet](#) for 2023 GS for the General Session (column A). Only two of these funding items have performance measures for which you will need to report FY 23 performance data. For the remaining supplemental funding items from this past session, you only need to report on the month and year of implementation and actual amount spent.

Prior-year funding items identified for an additional year of reporting

These items are items that have been reported previously and have been flagged for an additional year of reporting. You can find them in the 'Repeat Reporting' tab of the [Google sheet](#). These items are the ONLY items that will NOT be reported in Performance Prep. **That information should be recorded in a Google sheet or Excel file and emailed to Jill Curry , Brenda Hernandez , and Kimberly Madsen** (you can make a copy of the 'Repeat Reporting' tab and use columns P-R). **Do not overwrite the information you previously reported for these funding items in Performance Prep.**

Locate Specific Funding Items

The easiest way to locate a specific funding item in Performance Prep is to type in at least part of the name of the funding item (in the filter at the top of the funding items table). In the [Google sheet](#), you can find the name of the funding item in column D.

Funding Item Name Contains

 |

How to Report on Funding Items

After you locate the funding item on which you need to report, click on the name of the funding item (which will be blue) e.g. Early Intervention - Optional Extended-day Kindergarten below.

Reporting Requirement	Performance Measure	Funding Item
  	Increasing # of Utah Full-Day Kindergarten Classrooms  	Early Intervention - Optional Extended-day Kindergarten

Once you select the name of the funding item, a sidebar form will open on the right side of your screen where you can input your data. Here you can enter the implementation date, amount spent, and the performance measure data. Along with entering those data, you may edit the description of the funding item and add contextual information in the annotation box.

Early Intervention - Optional Extended-day Kindergarten

Funding Item Description

This request expands ccess for additional students to participate in the Early Intervention program, often called Optional Extended-day Kindergarten. Additional funding into the program allows for greater distribution to local education

Edit the funding item description.

Projected/Completed Implementation Date

Click calendar to select date.



Enter the month and year of implementation (or anticipated full implementation).

Amount Spent

\$

Input the amount spent.

Target Value

290

Input the performance measure outcome data for FY 23.

Actual Value

#

Annotation

Optionally, describe your target and actual values with data labels or other contextual information.

This target was determined using the funding formula based on prioritized need in alignment with the legislation. This target

Describe your target or actual value data or add other contextual information.

You will know you have fulfilled all of the reporting requirements when the icons under Reporting Requirement turn green.

The screenshot shows a table with three columns: Reporting Requirement, Performance Measure, and Funding Item. The first row is highlighted in light blue. Under the Reporting Requirement column, there are three green circular icons: a dollar sign, a checkmark, and a refresh symbol. Red arrows point from these icons to three separate callout boxes. The top callout box points to the refresh icon and contains the text: "Indicates performance data have been reported." The middle callout box points to the checkmark icon and contains the text: "Indicates implementation data have been reported." The bottom callout box points to the dollar sign icon and contains the text: "Indicates expenditure data have been reported." The Performance Measure column contains the text "Increasing # of Utah Full-Day Kindergarten Classrooms" and two small icons (an eye and a pencil). The Funding Item column contains the text "Early Intervention - Optional Extended-day Kindergarten".

Reporting Requirement	Performance Measure	Funding Item
	Increasing # of Utah Full-Day Kindergarten Classrooms 	Early Intervention - Optional Extended-day Kindergarten

Indicates performance data have been reported.

Indicates implementation data have been reported.

Indicates expenditure data have been reported.

Review Funding Item Reporting (Analysts)

Analysts can review the data that have been entered by agencies by clicking on the name of the funding item which will open the sidebar form. After reviewing the information, analysts may enter comments in the public comment text box and LFA analysts may enter a recommendation in the recommendation text box.

Transit/Rail Bonds Rescission - Rail Transportation Restricted Account

Funding Item Description

Rail Transportation Restricted Account

Projected/Completed Implementation Date

July 2022



Amount Spent

\$32,000,000

Target Value

100%

Actual Value

100%

Annotation

Optionally, describe your target and actual values with data labels or other contextual information.

\$30,000,000 to Brigham City to complete overpass at Forest Street.

GOPB/LFA Analyst Public Comment

LFA Public Recommendation

Save

Analysts may enter information in the public comment text box.

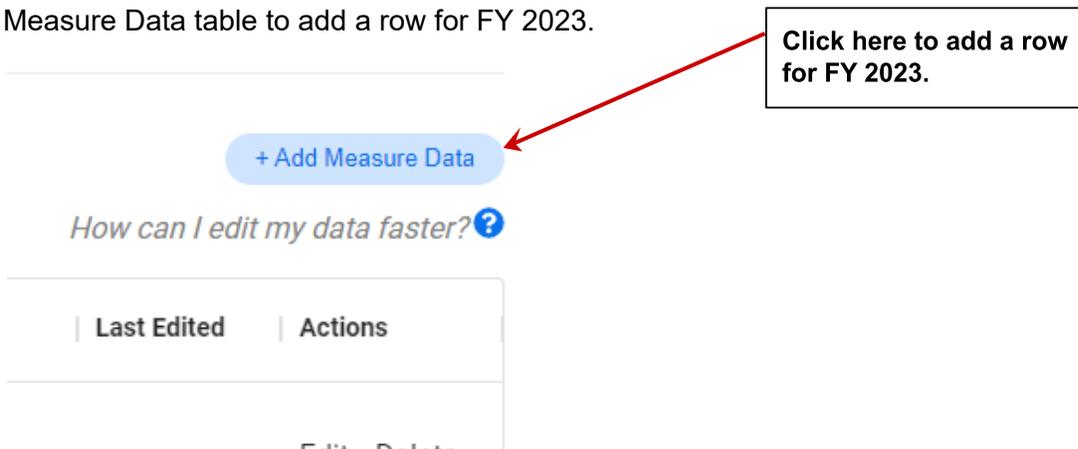
LFA analysts may enter a recommendation in the LFA Public Recommendation text box.

Can't Find Where to Enter My Performance Measure Data (Actual Value)

In some cases, a performance measure was approved with no target or without a target for FY 23. In those cases, the sidebar form will not have a place for agencies to enter performance measure data. To enable data entry, agencies will first need to locate the performance measure. The easiest way to do so is to use the 'Name contains' filter to search by measure name on the Manage Performance Measures page.



Once you locate your measure, click on the Measure Name which will be blue. This will take you to the page for that performance measure. Select '+Add Measure Data' above the Performance Measure Data table to add a row for FY 2023.



This selection will take you to the form where you will select FY 2023 and then enter a value for the target. If you know the actual value, you may enter that here as well. If not, you can enter it in the sidebar form when you subsequently click on the name of the funding item.

Fiscal Year *

Select FY 2023.

Measure Format

For number, percent, and dollar value entries, simply enter digits without formatting. For instance, 95% would simply be entered as 95 (instead of 0.95). For text entries, enter a concise update such as "Complete" and enter further detail in the Annotation field below.

Enter the target.

Target Value *

Actual Value

Annotation

Optionally, describe your target and actual values with data labels or other contextual information.

You may also enter the actual value and text describing your target and actual values or other contextual information.

Click here to save the data entry.

Cancel

Save

Line Item Performance Measures Reporting

Reporting Requirements

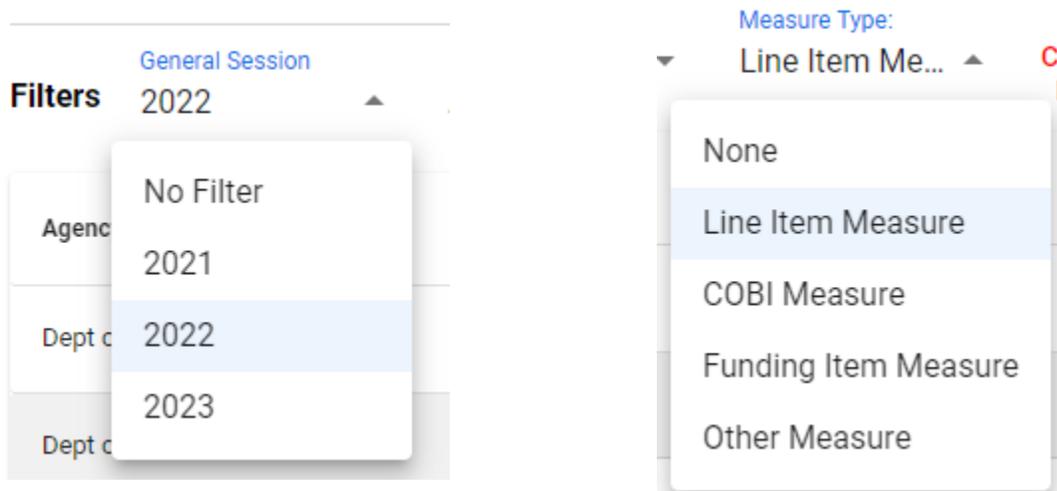
Agencies are required to report on line item performance measures **on or before August 15**. There are two items on which agencies are required to report:

- A final status report of performance measures in FY 2023 appropriations bills. This information will be reported in Performance Prep.
- Any recommended changes for the next fiscal year to the agency's previously adopted performance measures or targets. This information will be given to your LFA and GOPB analysts.

Line Item Measures on Which You Will Need to Report

Agencies need to report on line item performance measures from FY 2023 appropriations bills. If you are unsure about which measures you have to report for FY 2023, you can reference the performance measures tables in LFA's [2022 Budget of the State of Utah](#).

To view Line Item Measures, navigate to the Manage Performance Measures page. This page can be found under All Measures from the dropdown navigation menu. On the Manage Performance Measures page, you can filter for the relevant line item performance measures by selecting '2022' for the General Session and 'Line Item Measure' for Measure Type.



How to Report on Line Item Measures

Once you locate the desired measure, select the name of the measure (in blue) which will take you to the page for that performance measure. You may enter performance measure data in two ways. First, you may use in-line editing to enter the data directly into the Performance Measure Data table.

To edit data within a cell, double click on it, enter your data, and then hit Enter, Tab, or click your mouse off of the edited cell. You may add or edit data in all of the cells except for the Last Edited column.

We added inline editing to make edits fast and easy. Here are some tips to use it:

1. To edit data within a cell, double click on it.
2. To save your edit, press the Enter or Tab keys or click your mouse off of the edited cell.
3. To cancel an edit, press the Esc key to exit the cell without any changes.

Alternatively, you can click on the 'Edit' action to edit a data entry in a form.

Alternatively, you can click on 'Edit' in the Actions column to edit data in an existing row or select '+Add Measure Data' to add a new row of data to the table. Both actions will open the data entry form.

Click here to add a new row of data.

+ Add Measure Data

How can I edit my data faster? ?

Fiscal Year	Context	Last Edited	Actions
2023		2023-03-31	Edit Delete

Click here to edit a row of data.

Fiscal Year *

Select One

2023 X

Measure Format

Percent (%)

For number, percent, and dollar value entries, simply enter digits without formatting. For instance, 95% would simply be entered as 95 (instead of 0.95). For text entries, enter a concise update such as "Complete" and enter further detail in the Annotation field below.

Target Value *

60%

Enter the actual value.

Actual Value

%

Enter information about your data or any other contextual information.

Annotation

Optionally, describe your target and actual values with data labels or other contextual information.

Click here to save the data entry.

Cancel

Save

View Funding Items Requiring a Performance Measure

With the passage of [S.B. 296, Performance Reporting and Efficiency Process Amendments](#) (D. Ipson, 2023 General Session), executive department agencies are required to propose performance measures and targets for funding items that increase state funding by \$500,000 or more from state funds. To view the list of funding items where a performance measure is required, use the 'Reporting Requirement' filter and select 'Includes Performance Measure.'

Total Funding Item Count **Performance Measure Required** 0 **New Measures Proposed** 0 **Existing Measures Used** 0 **Awaiting GOPB/L Review**

Filters **General Session** 2023 **Agency** **Funding Item Name Contains** **Reporting Requirement**

Click here to filter the list for new funding items requiring a performance measure.

Select 'Includes Performance Measure.'

Reporting Requirement

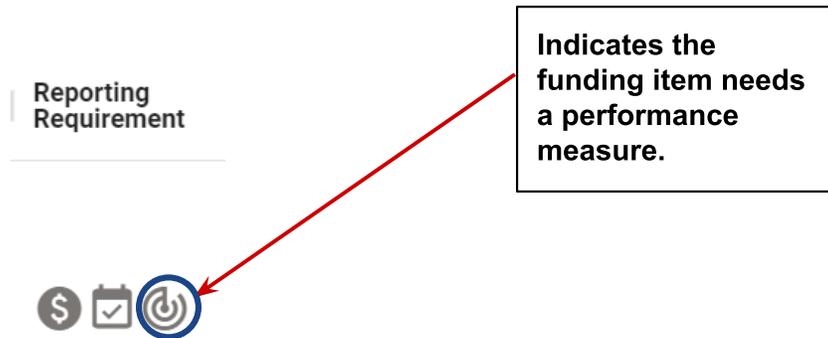
- No Filter
- Includes Performance Measure**
- Only Implementation Date and Amount Spent

Be sure the 2023 General Session filter is selected. If it is not, above the table, choose the first filter dropdown from the left and select 2023. The page will remember your filter settings, so this will remain each time you return to the page until you change it.

Filters **General Session** 2023

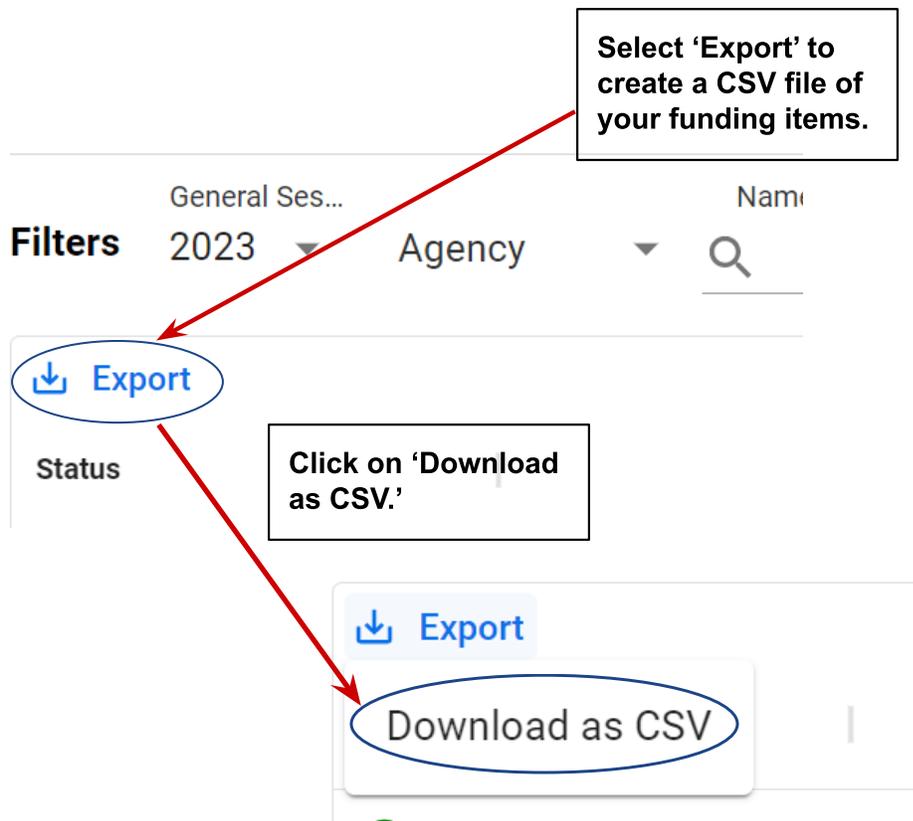
- No Filter
- 2021
- 2022
- 2023**

When a performance measure is required, you will see a target-like icon under the Reporting Requirement column.



Export List of Funding Items

If you would like to export a list of funding items, select 'Export' at the top left of the table and select 'Download as CSV' to create a CSV file of your funding items. The funding items included in the file will reflect any filters you have selected to filter the table.



Propose Performance Measures for New Funding Items

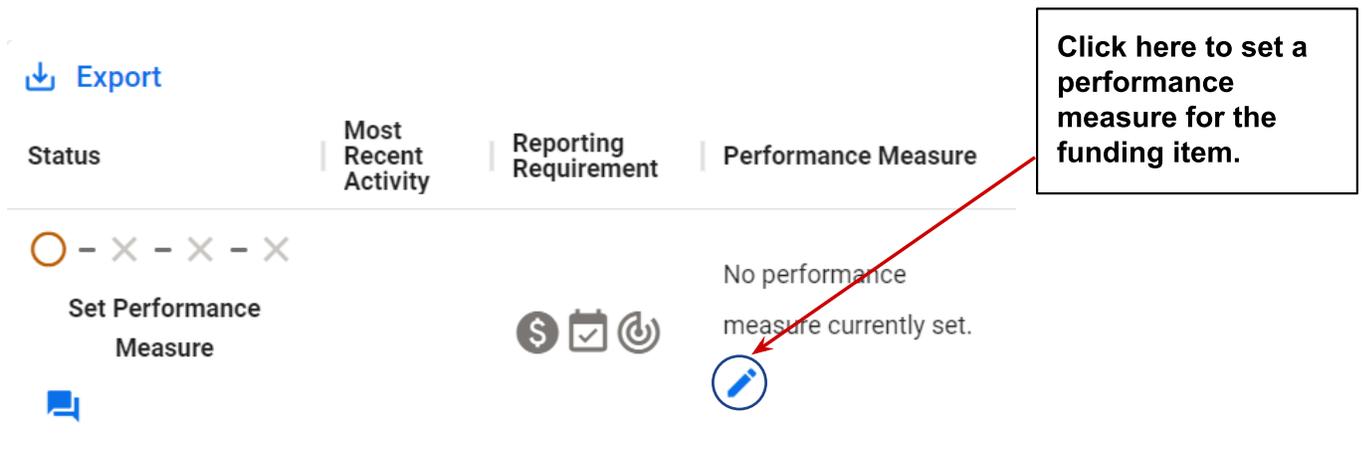
A series of icons in the Status column depict the process for funding items that require performance measures:

1. Set the performance measure
2. Set the performance target
3. Review and/or consultation
4. Obtain an approval from both the GOPB and LFA analyst

Beneath those icons, the status is summarized, and relevant action buttons are made available. Items can be filtered by status with the rightmost filter dropdown:



To propose a performance measure for a new funding item that requires a performance measure, select the blue pencil icon in the Performance Measure column. When you hover over it, it will say 'Set/Edit Performance Measure.'



This selection will take you to the Set Performance Measure screen. Toward the top of the screen, you will see the funding item name, description, and line item.

Set Performance Measure

The funding item name, description, and line item.

Explore existing performance measures below for one that already embodies the desired impacts of this funding item. If an existing measure aligns with the intended outcomes of this new funding, use that measure. If not, [set a new measure](#).

Funding Item Name: Public Safety Officer Scholarship Program

Funding Item Description: This bill enacts a public safety officer scholarship program for high school students entering into a law enforcement career. Enactment of this legislation likely will not materially impact state revenue. Enactment of this bill would appropriate \$5,000,000 one-time from the Income Tax Fund beginning in FY 2024 to the Utah Board of Higher Education (UBHE) to create the Karen Mayne Public Safe...[Show More](#)

Funding Item Line Item: QAFA RGT Student Assistance

Select an Existing Performance Measure

You have two options for proposing a performance measure for the funding item. One is to explore your existing performance measures for a measure that already embodies the desired impacts of the funding item. If an existing measure aligns with the intended outcomes of the new funding item, use that measure. You can view your existing performance measures in the table on the Set Performance Measure screen. You can filter by performance measure name, description, and line item.

Existing Performance Measures [Filters](#)

Agency	Division or Program	Line Item	Name	Description
--------	---------------------	-----------	------	-------------

Click here to access the filters.

Apply Filters ×

Performance Measure Name contains: _____

Performance Measure Description contains: _____

Line Item: _____

Apply Filter

If you find an existing performance measure that may work, but you would like to see more detail click on 'View Summary' for more information about that performance measure. To use the performance measure, select 'Use this measure.'

Name	Description
Number of Voter Certification Course Sessions Conducted	This measure demonstrates that we are actively working with election officials from throughout Utah's counties on training to help promote free, fair, and secure elections

Click here to view information about the existing performance measure.

Click here to use the existing performance measure for the funding item.

[View Summary](#)

[Use this measure](#)

Set Target

Once you have selected 'Use this measure,' you will see the system state that the funding item and the existing performance measure are now 'Currently matched.' If you want to unlink the funding item from the existing performance measure, select 'Don't use this measure.'

The screenshot shows a table with two columns: 'Name' and 'Description'. The 'Name' column contains 'Number of Voter Certification Course Sessions Conducted'. The 'Description' column contains 'This measure demonstrates that we are actively working with election officials from throughout Utah's counties on training to help promote free, fair, and secure elections.' To the right of the description are four buttons: 'View Summary', 'Don't use this measure', 'Set Target', and 'Currently matched.' with a green checkmark. Three callout boxes with red arrows point to these buttons: 'Click here to unlink the performance measure from the funding item.' points to 'Don't use this measure'; 'Click here to set a target.' points to 'Set Target'; and 'Shows the funding item and performance measure are now linked.' points to 'Currently matched.'

Name	Description
Number of Voter Certification Course Sessions Conducted	This measure demonstrates that we are actively working with election officials from throughout Utah's counties on training to help promote free, fair, and secure elections.

Set a New Target for an Existing Performance Measure

When selecting an existing performance measure for a funding item, be sure you also set an upcoming target for the measure. Statute requires you to have a performance measure AND a target for each applicable funding item. In general, if the funding for the funding item is supplemental funding for FY 23, you will need a target for FY 23. If the funding item is funded with ongoing and/or one-time funding for FY 24, your performance measure will need a target for FY 24. There are exceptions such as when there is agreement among GOPB, LFA, and the agency that a performance measure will be reported in a future fiscal year.

After selecting 'Use this measure' to match a funding item to an existing performance measure, select 'Set Target' to input a target (in the above screenshot) which will take you to the Add Measure Data page.

On the Add Measure Data page you can enter the new target value. You are also required to enter the fiscal year (select the fiscal year that is tied to the anticipated target).

Fiscal Year *

2023

2023 X

Measure Format

Number (#)

For number, percent, and dollar value entries, simply enter digits without formatting. For instance, 95% would simply be entered as 95 (instead of 0.95). For text entries, enter a concise update such as "Complete" and enter further detail in the Annotation field below.

Target Value *

#

Actual Value

#

Annotation

Optionally, describe your target and actual values with data labels or other contextual information.

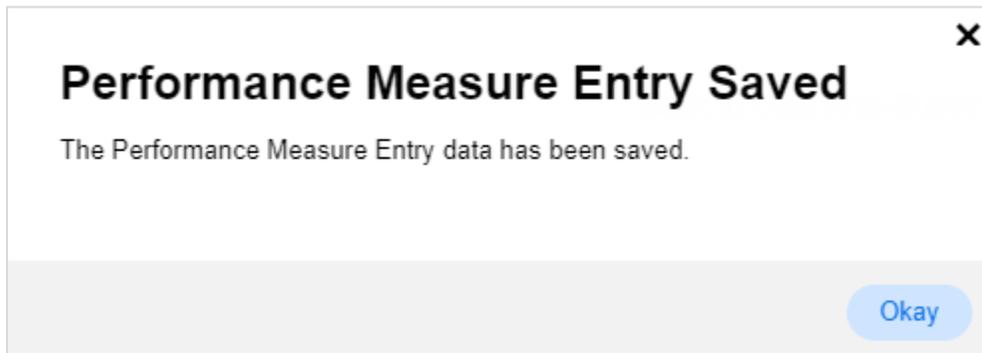
Cancel

Save

Enter the fiscal year and target value.

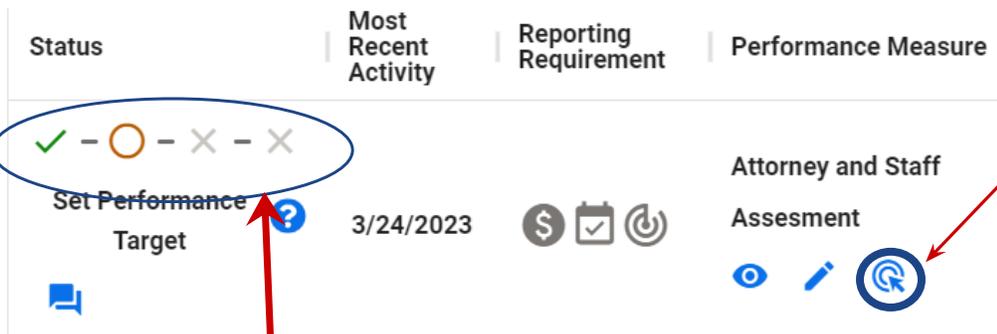
Click here to save the data entry.

After you click save, a pop up window will appear to let you know that the entry has been saved.



This screen tells you that the entry saved.

Alternatively, if the existing performance measure does not have a target for FY 23 or later, when you return to the Funding Item Performance screen, you will see an orange circle and language stating Set Performance Target. In order for your analysts to approve the performance measure for the funding item, you need to set a target for the performance measure. You may follow the instructions above for setting a new target for an existing performance measure or a quicker path to setting a new target is to select the target/arrow icon in the Performance Measure column which will take you to the Add Measure Data page where you can set the target for the performance measure (detailed above).

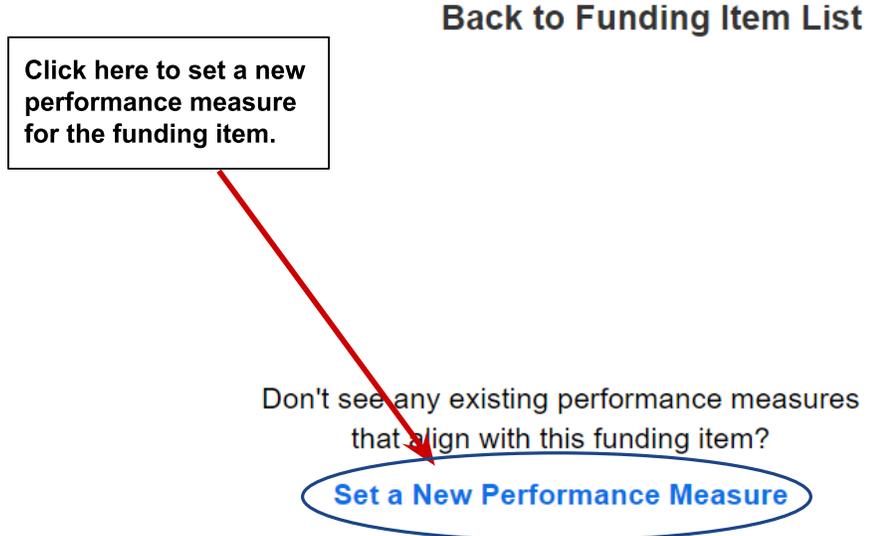


Click here to set a new target for the performance measure.

The orange circle and the text underneath tells you that the performance measure needs a new target set.

Set a New Performance Measure

If an existing performance measure does not fit the funding item, you can propose a new measure for the funding item by selecting 'Set a New Performance Measure' toward the top right side of the Set Performance Measure screen.



This selection will take you to the Set a New Performance Measure form where you will fill out the information for the new performance measure. It may be helpful to use [this template](#) to gather information in advance of completing the form (make a copy of the template). The form **does not** save your responses until you submit them. Fields marked with asterisks are required.

Set a New Performance Measure

[Back to M](#)

[Describe Measure](#) → [Tag Measure](#) → [Targets](#) → [Reporting](#) → [Review](#) → [Submit](#)

Tell the story of your agency's progress and needs by establishing a meaningful performance measure with GOPB and LFA per their guidance. Agencies are required to establish measures for appropriation line items and some new funding items.

Use [this template](#) to gather information in advance of completing this form. By referencing the template, this form takes only a few minutes to complete. Required questions are marked with a red asterisk. At the end, your agency's responses will be submitted to GOPB and LFA for review.

Note: The form does not save your responses until you submit them.

Click here to begin proposing a new measure.

Next

After selecting an existing performance measure or proposing a new performance measure for the funding item, when you view the funding item on the Funding Item Performance page, you will see an initial green checkmark in the Status column. If the measure has a target for FY 23 or later, you will see a second green checkmark in the Status column and text stating that the measure and target are awaiting GOPB/LFA review.

The first green checkmark shows a performance measure has been proposed for the funding item and the second green checkmark shows a target has been set for the performance measure.

[Export](#)

Status

✓ - ✓ - ✕ - ✕

Awaiting GOPB/LFA Review

[Like](#) [Help](#) [Comment](#)

Review Proposed Performance Measures for New Funding Items (Analysts)

GOPB and LFA analysts both need to review and approve a performance measure for it to become active. Analysts can utilize the filters to locate the performance measures they need to review. In general, you will want to filter for funding items for your agencies and for measures awaiting GOPB/LFA Review or that are pending your approval.

- No Filter
- Performance Measure Needed
- Target Needed
- Awaiting GOPB/LFA Review**
- Needs Consultation
- Pending GOPB Approval
- Pending LFA Approval
- Approved

Select the blue eye icon to view the proposed performance measure for the funding item.

Status	Most Recent Activity	Reporting Requirement	Performance Measure
✓ - ✓ - ✗ - ✗ Awaiting GOPB/LFA Review 👍 ? 🗨️	3/24/2023	💰 📅 🔁	Attorney and Staff Assesment 

Click here to view a summary for the measure.

If you approve of the proposed performance measure for the funding item, select the blue thumbs up icon to mark it as approved. If you think the proposed performance measure needs additional work before approving, select the blue question mark icon to mark that the proposed performance measure and/or target needs consultation.

The screenshot shows a table with columns: Status, Most Recent Activity, Reporting Requirement, and Performance Measure. A row is highlighted with the following details:

- Status:** A row of icons: a green checkmark, a grey checkmark, a grey X, and another grey X.
- Most Recent Activity:** The text "Awaiting GOPB/LFA Review" and the date "3/24/2023".
- Reporting Requirement:** Three icons: a dollar sign, a calendar, and a refresh symbol.
- Performance Measure:** The text "Attorney and Staff Assesment" and two icons: an eye and a pencil.

Below the row are three blue circular icons: a thumbs up, a question mark, and a comment box. Three callout boxes with red arrows point to these icons:

- Top-left box:** "Click here to mark you approve of the proposed performance measure and target for the funding item." (points to thumbs up)
- Top-right box:** "Click here if you think the proposed performance measure needs additional work before approving." (points to question mark)
- Bottom box:** "Click here to see the high-level activity for the funding item including notes from agencies and analysts." (points to comment box)

Activity Feed

Analysts and agencies may communicate through the Activity Feed by selecting the blue comment box icon (in the above screenshot). When you select this button, it provides a log of actions taken for the funding item. There is also an option for agencies and analysts to add comments to the activity log.

Activity Last Updated: Mar 10, 2023, 04:55:23 PM [Refresh](#)

Mar 8, 2023

05:26 PM

Funding item imported into the system.

Mar 10, 2023

04:51 PM

Jill Curry (GOPB) set the set performance measure for the funding item to *Kindergarten Readiness - Literacy*

Leave a comment... >

Running log of activity for the funding item.

Add comments here by typing them in and clicking enter.

Once both analysts have approved the measure, it will show in the Status column that the measure has been approved. For newly proposed measures, once both analysts mark it as approved, the measure will move from pending to active status in Budget Prep.

Status | Most Recent Activity | Reporting Requirement

✓ - ✓ - ✓ - ✓
 Approved

\$ 📅 🔄

? 💬

The four green checkmarks show the performance measure and target have been finalized for the funding item.